REIDIN

Data Analytics

DUBAI
RESIDENTIAL PROJECT LAUNCH TRACKER

H1 2026

TABLE OF CONTENTS

REIDIN Data Analytics

01 - LAUNCH ACTIVITY

Launch activity by month, January through June 2026

141 PROJECTS	**50,935** TOTAL UNITS	**AED 1,972** AVG LAUNCH PSF	**AED 1,725** MEDIAN LAUNCH PSF

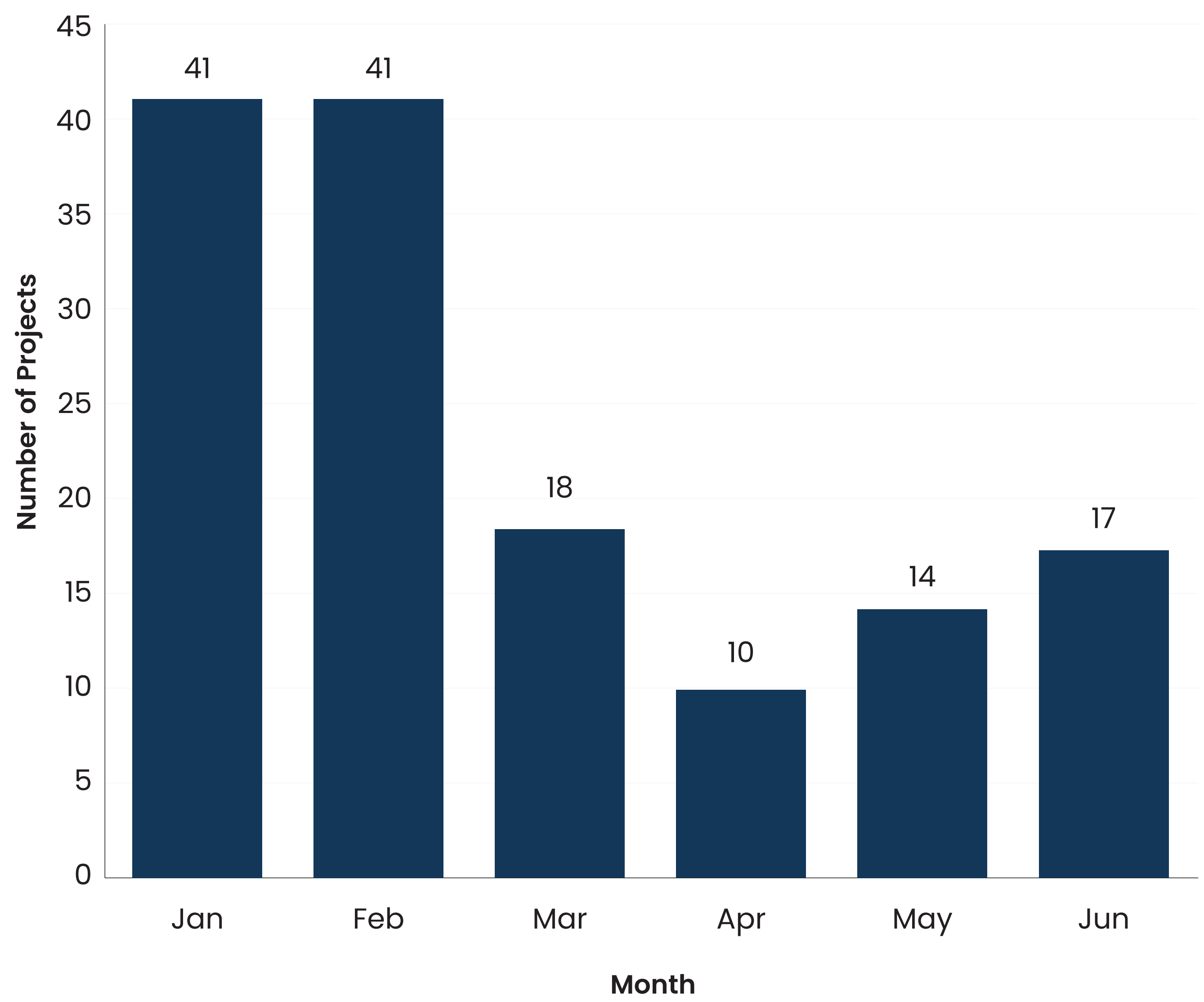
Launch activity was concentrated at the start of the year, with 41 projects launched in both January and February. The monthly count declined to 10 projects in April before increasing to 17 in June, remaining below January and February levels.

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
41 PROJECTS	**41** PROJECTS	**18** PROJECTS	**10** PROJECTS	**14** PROJECTS	**17** PROJECTS
21,771 Units	**12,280** Units	**6,746** Units	**3,183** Units	**2,942** Units	**4,013** Units

January's launched-unit total was heavily influenced by Mercedes-Benz Places, which accounted for 12,814 units, or 58.9% of the month's total. Excluding this project, January recorded 8,957 launched units, 27.1% fewer than February, indicating that the headline total overstated the breadth of launch activity during the month.

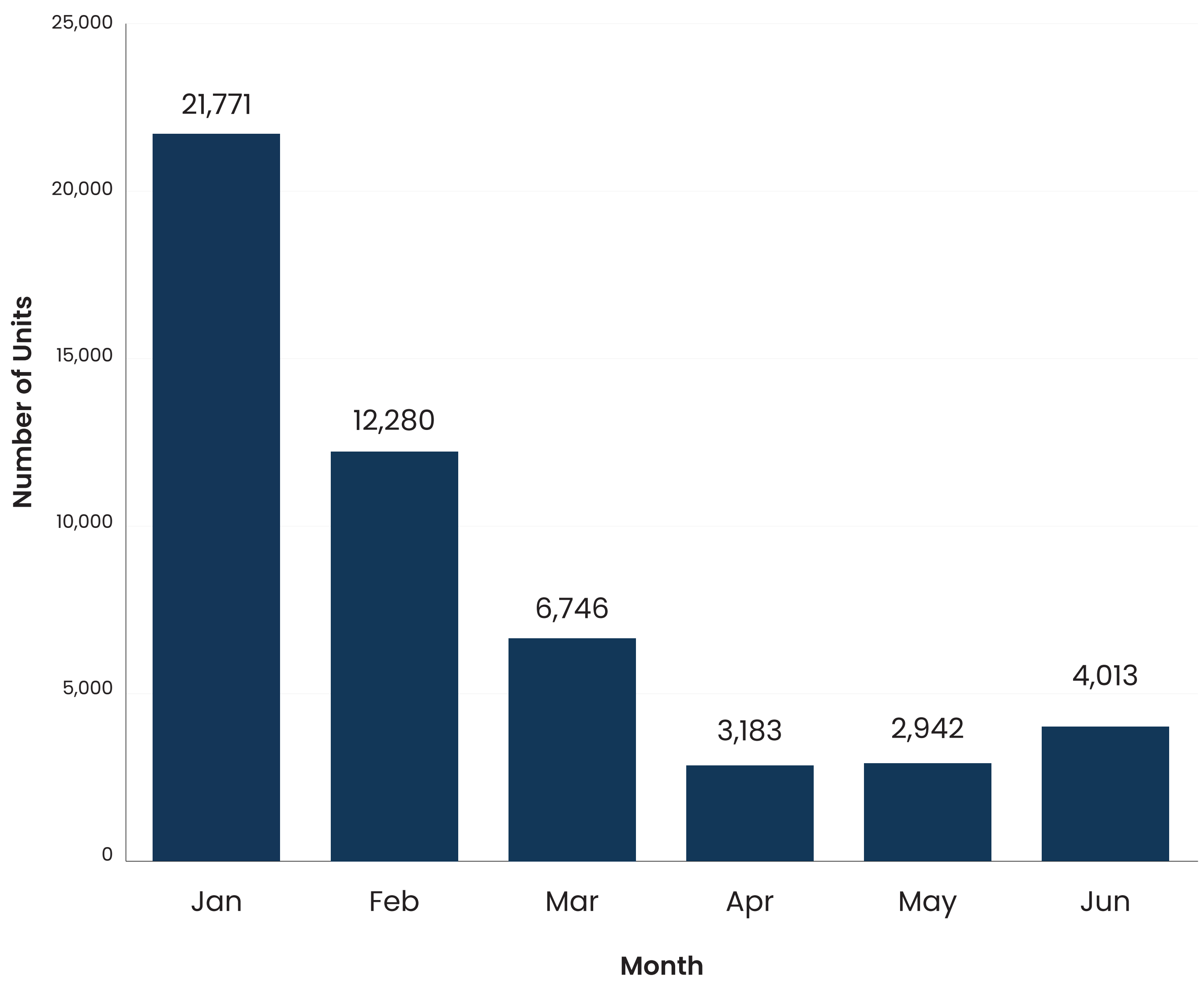
MONTHLY PROJECT LAUNCHES, CONCENTRATED IN JANUARY AND FEBRUARY.

Project launches per month across H1 2026



MONTHLY UNITS RELEASED

Units launched by month. Mercedes-Benz Places accounted for 58.9% of January's total.



02 - PRICING

Launch Activity Was Concentrated in the Mid-Market and Upper-Mid Segments

The Upper-Mid segment accounted for 26,592 units, representing 52.6% of all units launched, followed by the Mid-Market segment with 20,620 units and a 40.5% share. Together, these segments represented 47,212 units, or 92.7% of all units launched during H1 2026.

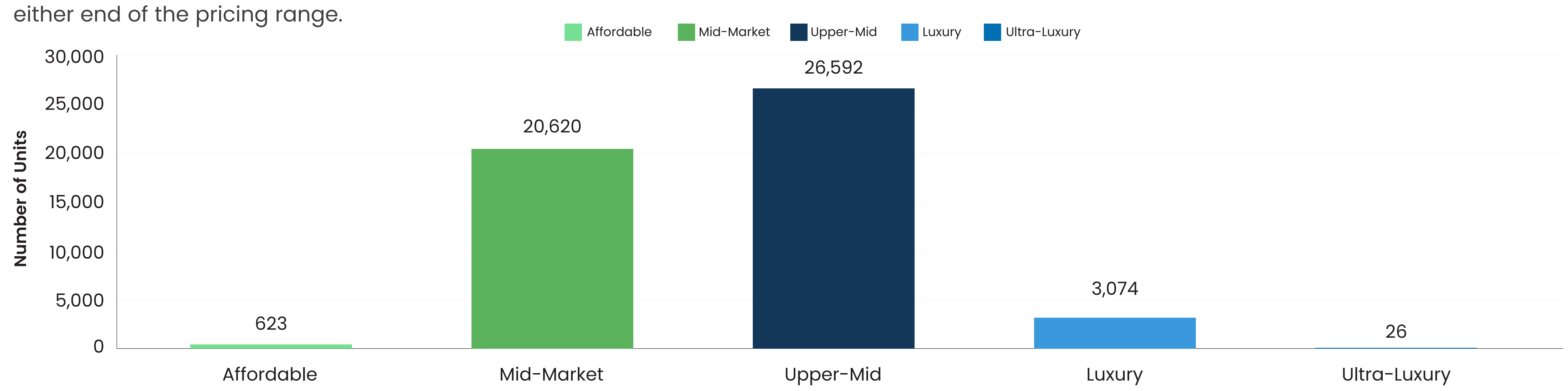
MARKET SEGMENT THRESHOLDS (AED PER SQ. FT.)

< 1,200	1,200–1,800	1,800–3,000	3,000–6,000	> 6,000
AFFORDABLE	MID-MARKET	UPPER-MID	LUXURY	ULTRA-LUXURY

Mid-Market and Upper-Mid projects represented 87.2% of project launches. Luxury and Ultra-Luxury projects accounted for 9.2%, indicating that relatively few projects were launched within the highest price brackets.

LAUNCH PRICE DISTRIBUTION BY MARKET SEGMENT

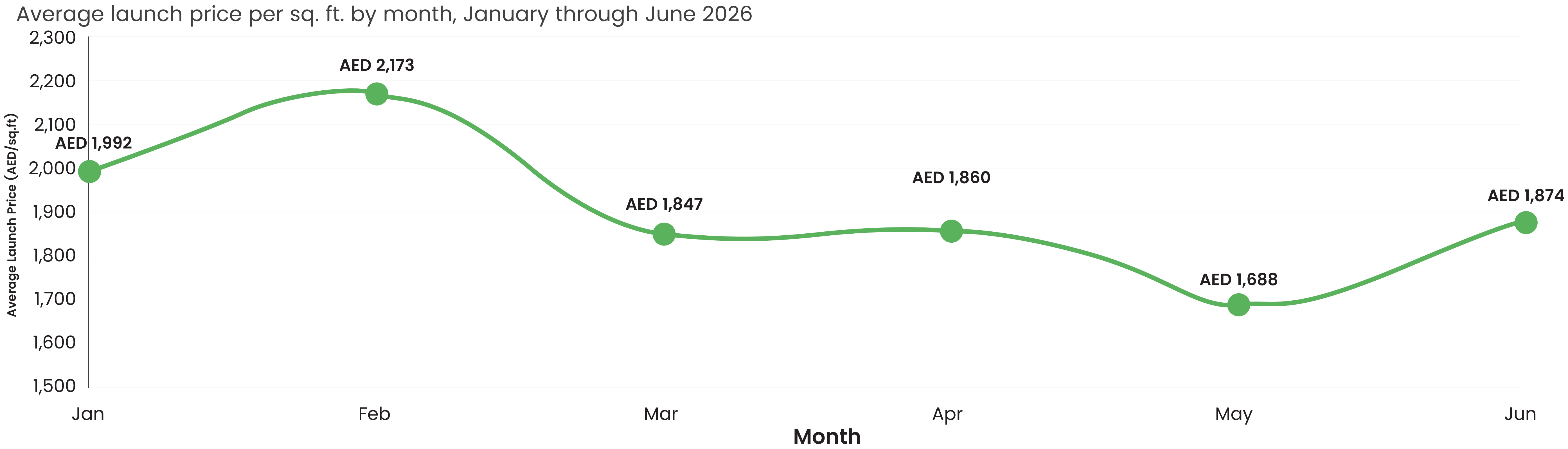
Luxury and Ultra-Luxury projects contributed 3,100 units, representing 6.1% of launched units, while Affordable projects accounted for 623 units and a 1.2% share. Most launched units were therefore concentrated within the two central price brackets, with comparatively limited activity at either end of the pricing range.



Average launch prices peaked at AED 2,173 per sq.ft in February and declined to AED 1,688 in May. The average increased to AED 1,874 in June but remained 5.9% below January. This movement reflects changes in the mix of projects launched during the period.

AVERAGE LAUNCH PRICE PER SQ. FT., MONTH BY MONTH

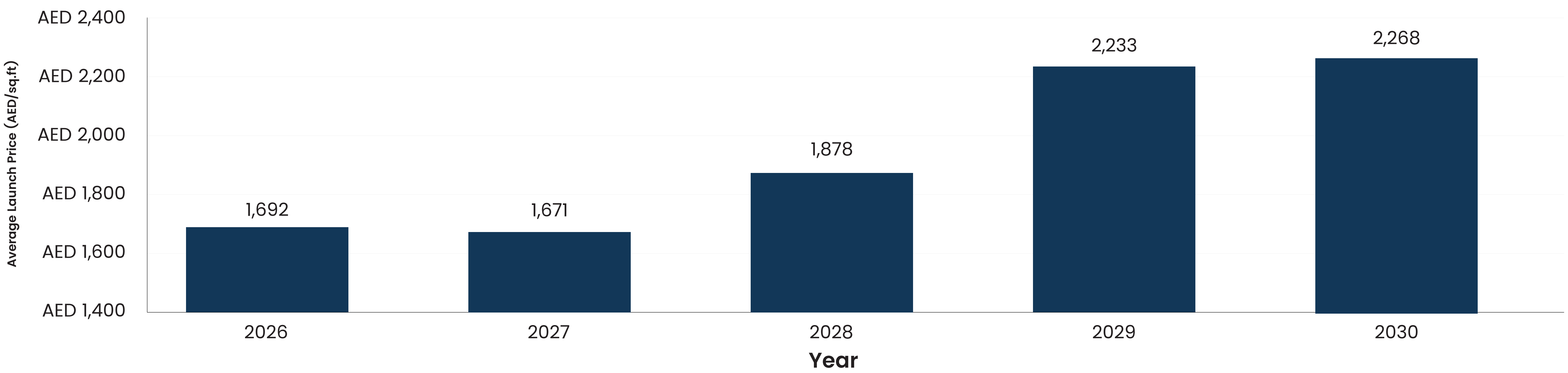
Average launch price per sq. ft. by month, January through June 2026



Average launch prices remained broadly stable across the 2026 and 2027 delivery cohorts at AED 1,692 and AED 1,671 per sq. ft., before rising to AED 1,878 in 2028, AED 2,233 in 2029 and AED 2,268 in 2030. The increase across later cohorts indicates a growing concentration of higher priced projects in the longer term pipeline.

AVERAGE LAUNCH PRICE BY ANNOUNCED DELIVERY YEAR

Average launch price per sq. ft. for projects grouped by their announced delivery year



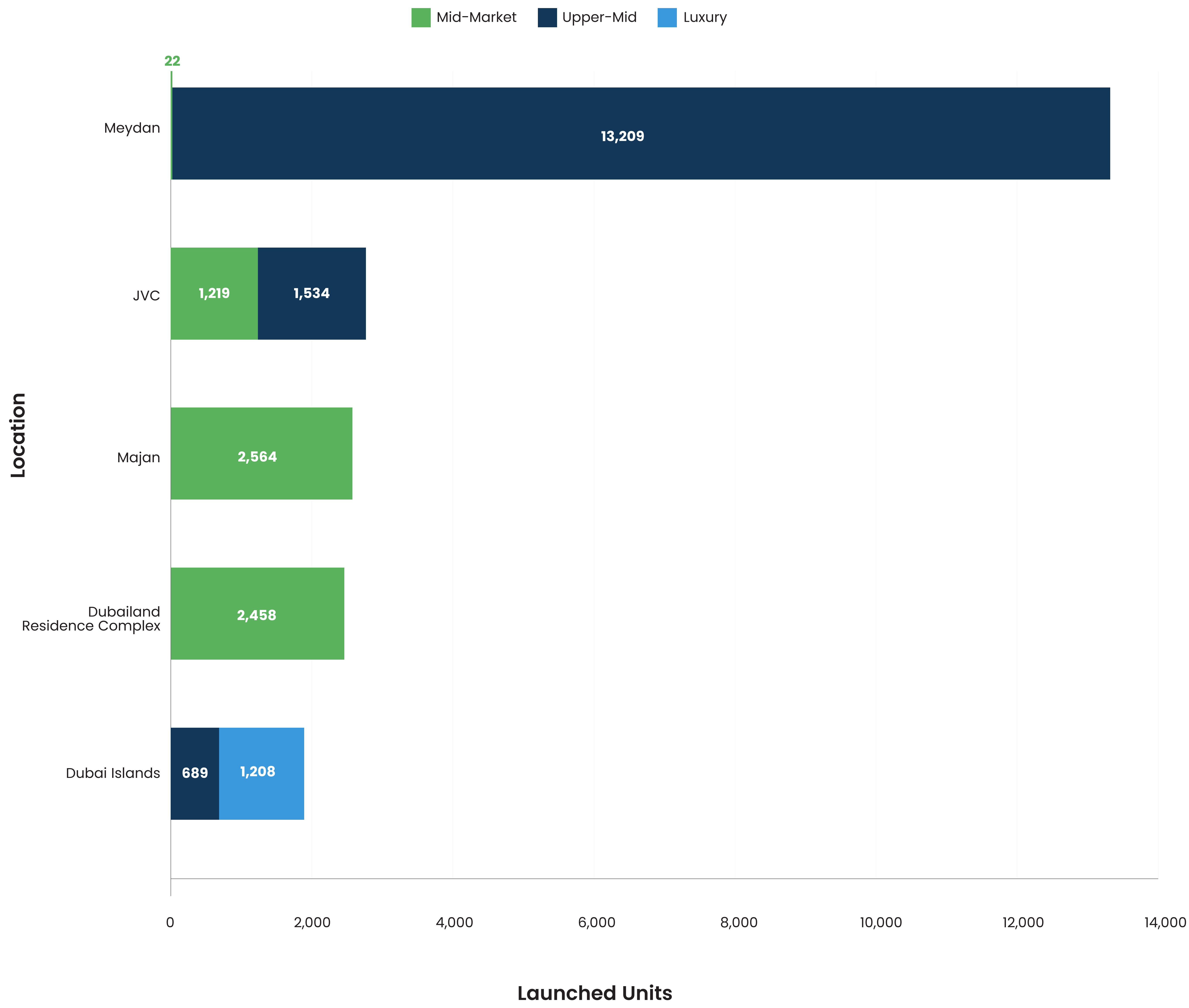
03 - GEOGRAPHY

Launch supply was concentrated in five locations, with Meydan dominating unit volume

The five locations shown accounted for 38 of 141 project launches and 22,903 of 50,935 launched units, representing 45.0% of all units launched in H1 2026. Meydan led with 13,231 units across five project launches, followed by JVC with 2,753 units across eight launches, Majan with 2,564 units across five launches, Dubailand Residence Complex with 2,458 units across eight launches, and Dubai Islands with 1,897 units across 12 launches.

PRICE SEGMENT MIX BY LOCATION

Upper-Mid projects contributed 15,432 units, representing 67.4% of the launched units across the five locations. Mid-Market projects accounted for 6,263 units, equal to 27.3%, while Luxury projects contributed 1,208 units, representing 5.3%.



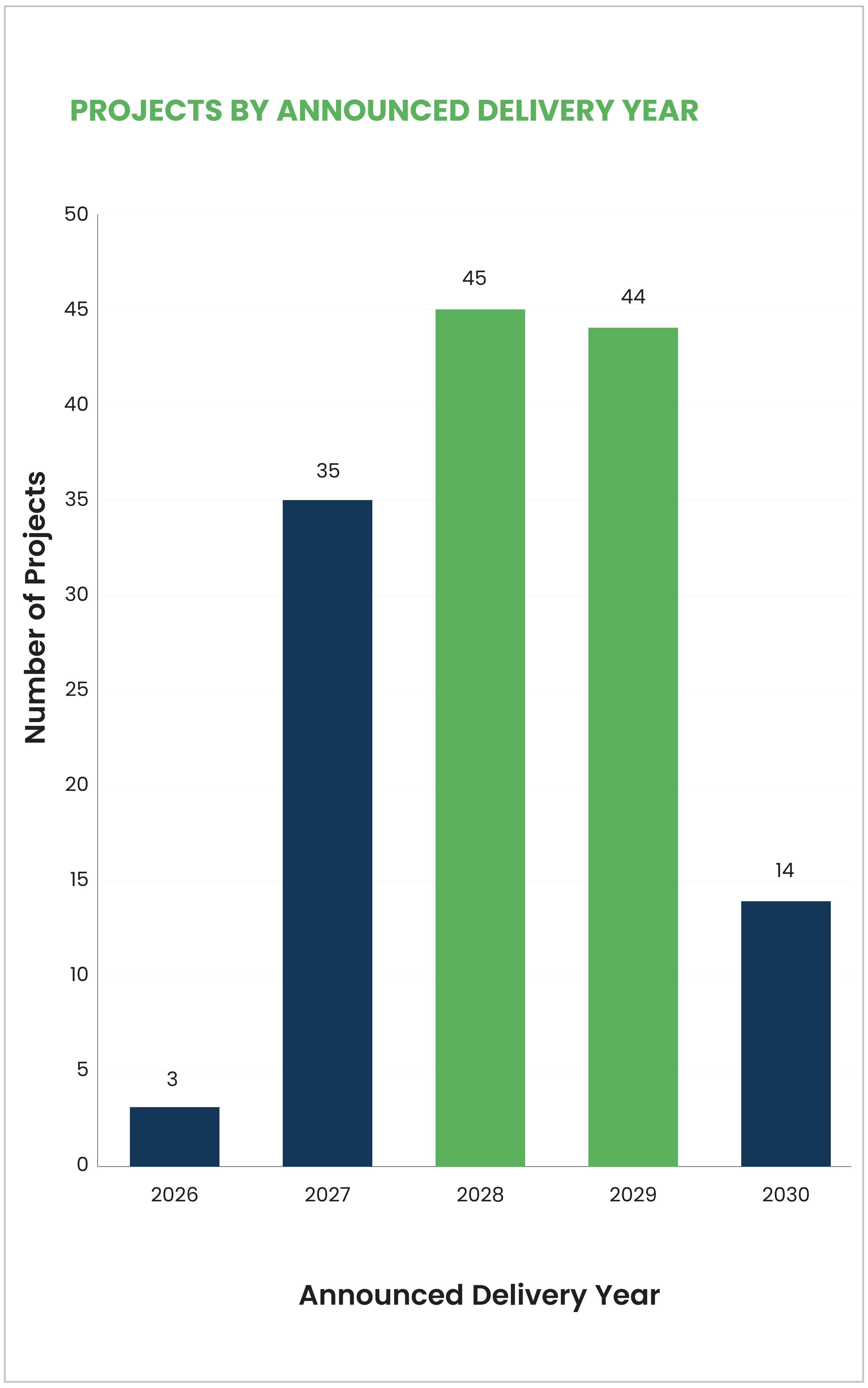
Projects priced between AED 1,200 and AED 3,000 per sq.ft accounted for 94.7% of the launched units across these five locations. Meydan included 13,209 Upper-Mid units and 22 Mid-Market units, while Dubai Islands included 1,208 Luxury units priced between AED 3,000 and AED 6,000 per sq.ft.

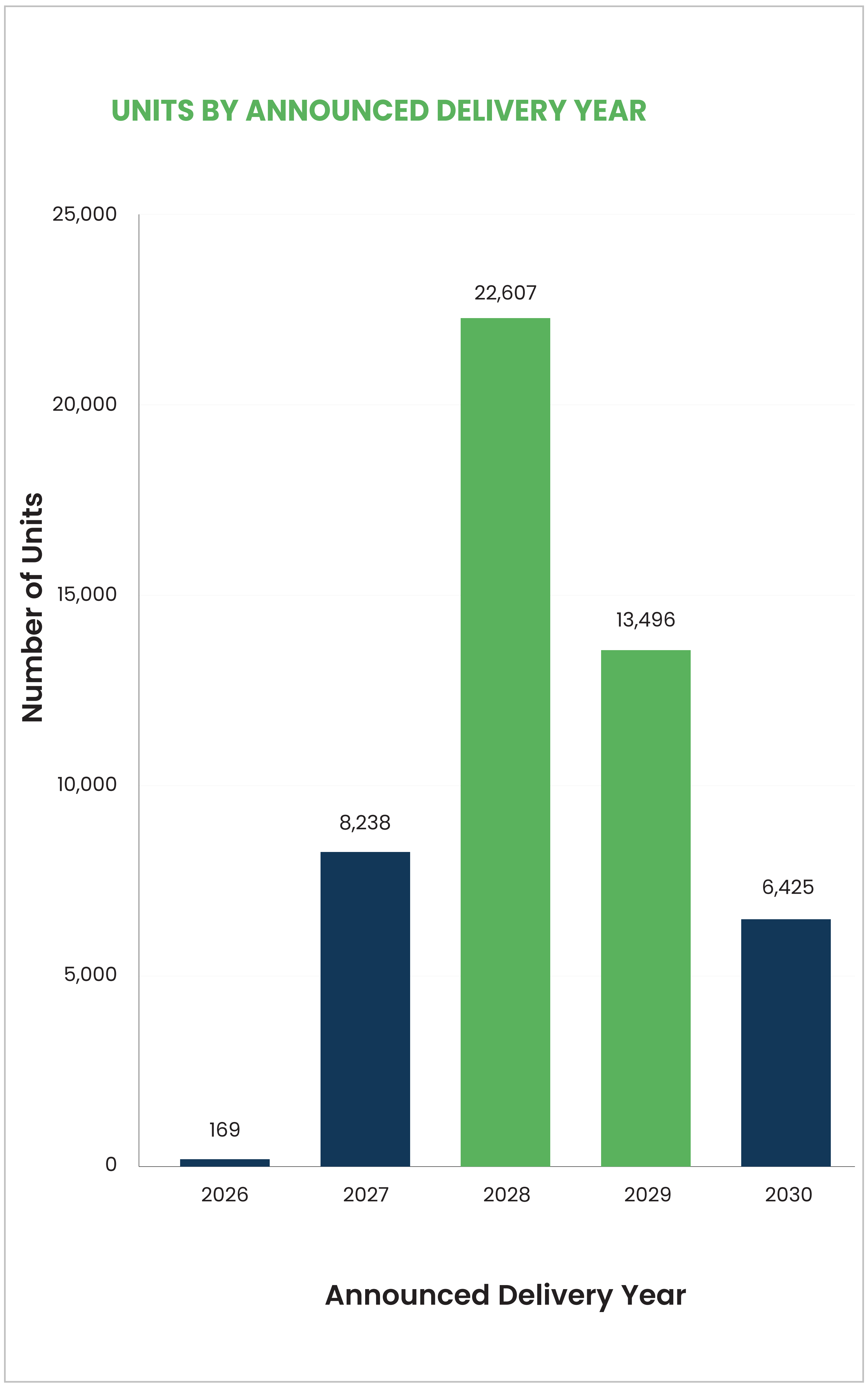
04 - ANNOUNCED DELIVERY PIPELINE

The H1 Launch Pipeline Is Concentrated in the 2028 and 2029 Announced Delivery Cohorts

The 2028 and 2029 announced delivery cohorts comprise 89 of 141 project launches and 36,103 of 50,935 units, representing 63.1% of launches and 70.9% of announced units. The 2028 cohort includes 45 projects and 22,607 announced units, while the 2029 cohort includes 44 projects and 13,496 announced units. This indicates a larger average project size among projects with announced delivery in 2028.

3	**35**	**45**	**44**	**14**
ANNOUNCED DELIVERY 2026	ANNOUNCED DELIVERY 2027	ANNOUNCED DELIVERY 2028	ANNOUNCED DELIVERY 2029	ANNOUNCED DELIVERY 2030
169	**8,238**	**22,607**	**13,496**	**6,425**
units	units	units, peak year	units	units





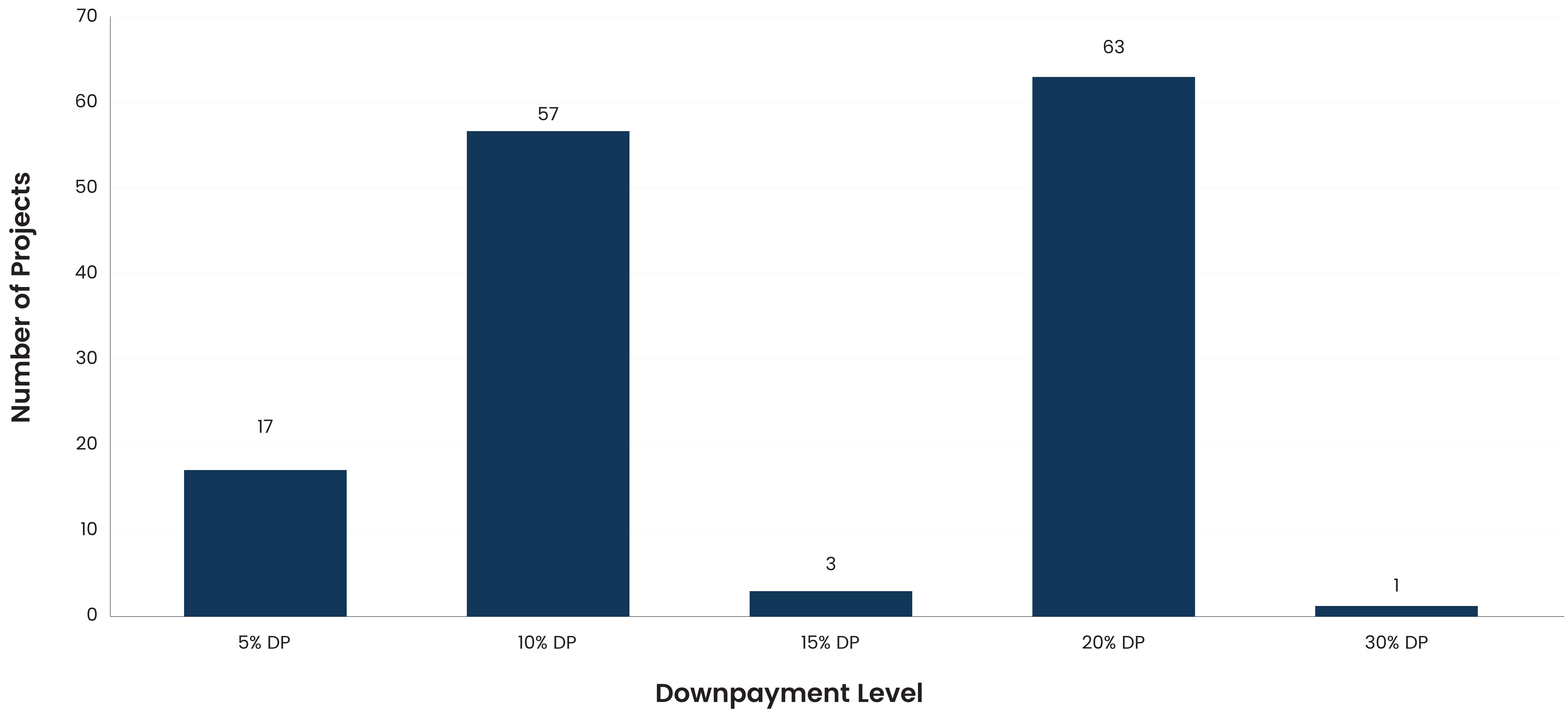
05 - PAYMENT PLANS

Post-Handover Payment Plan Adoption Increased During the Latter Part of H1

The share of project launches offering a post-handover payment option increased from 9.8% in January to 35.3% in June, reaching 35.7% in May. Across H1 2026, 27 of 141 project launches included post-handover payment terms. All 27 projects were launched at prices below AED 2,200 per sq.ft.

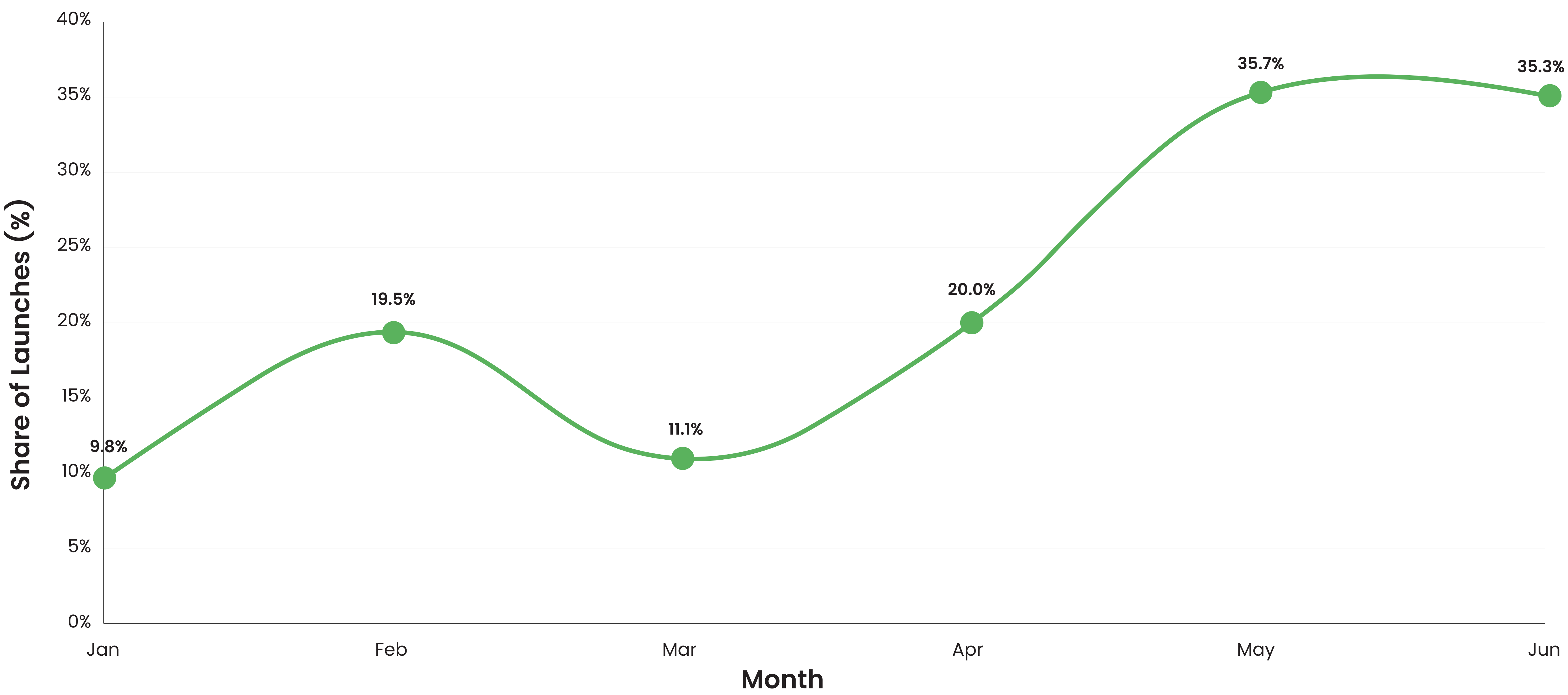
DOWNPAYMENT STRUCTURE, PROJECT COUNT

For projects with recorded downpayment terms, 10% and 20% downpayments accounted for 120 of 141 launches, or 85.1%. Specifically, 57 projects required a 10% downpayment, while 63 required 20%.



POST-HANDOVER PLAN ADOPTION BY MONTH

Share of launches per month that included a post-handover payment option, as advertised at launch.



06 - ANALYTICAL SIGNALS

Four Observed Relationships in the H1 2026 Launch Dataset

The following cross-variable observations describe relationships within the H1 launch records. They do not establish causation or represent market forecasts.

SIGNAL 01
BROKER COMMISSION TERMS INCREASED AFTER FEBRUARY

+0.33 pp

Average advertised commission increased from 4.96% in January–February to 5.29% from March–June, while the share of projects offering commission of 6% or more increased from 16% to 26%.

SIGNAL 02
POST-HANDOVER PAYMENT PLANS WERE ASSOCIATED WITH LOWER-PRICED PROJECTS

AED - 522

Projects offering post-handover payment terms averaged AED 1,550 per sq.ft, compared with AED 2,072 per sq.ft for projects without these terms, representing a difference of AED 522 per sq.ft. This comparison identifies an association within the launch dataset and does not establish that the payment-plan structure caused the difference in pricing.

SIGNAL 03
DEVELOPER LAUNCH PRICING VARIED BEFORE AND AFTER FEBRUARY

Azizi +8.4%

Azizi's launched units declined from 1,829 in January–February to 1,391 from March–June, while its average launch price increased from AED 2,075 to AED 2,250 per sq.ft. Other selected developers recorded different changes in average pricing and launched-unit volumes across the two periods.

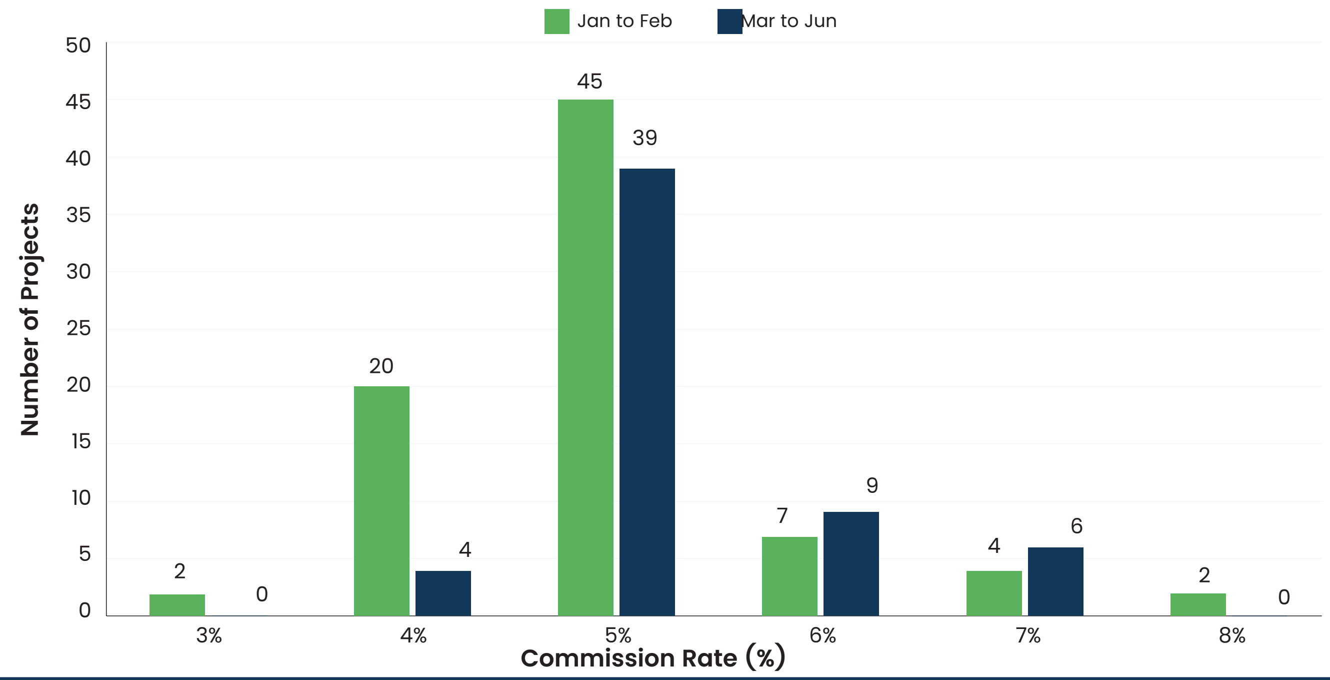
SIGNAL 04
Q2 2028 HAD THE HIGHEST CONCENTRATION OF ANNOUNCED UNITS

15,316 units

Q2 2028 contained 15,316 announced units, representing 30.1% of all H1 launched units. A single Meydan project accounted for 12,814 of these units, materially influencing the concentration observed in the quarter.

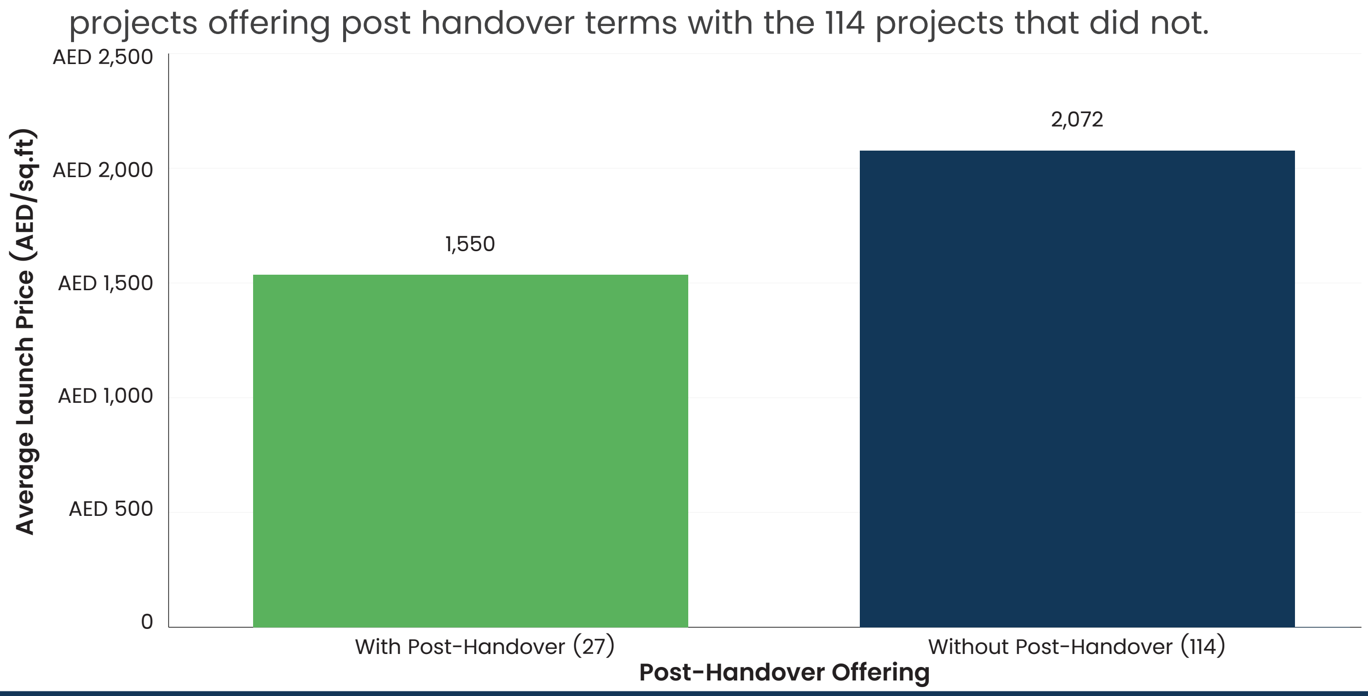
BROKER COMMISSION RATE, BEFORE AND AFTER FEBRUARY

Supports Signal 01 by showing the number of projects at each advertised commission rate from January to February and from March to June.



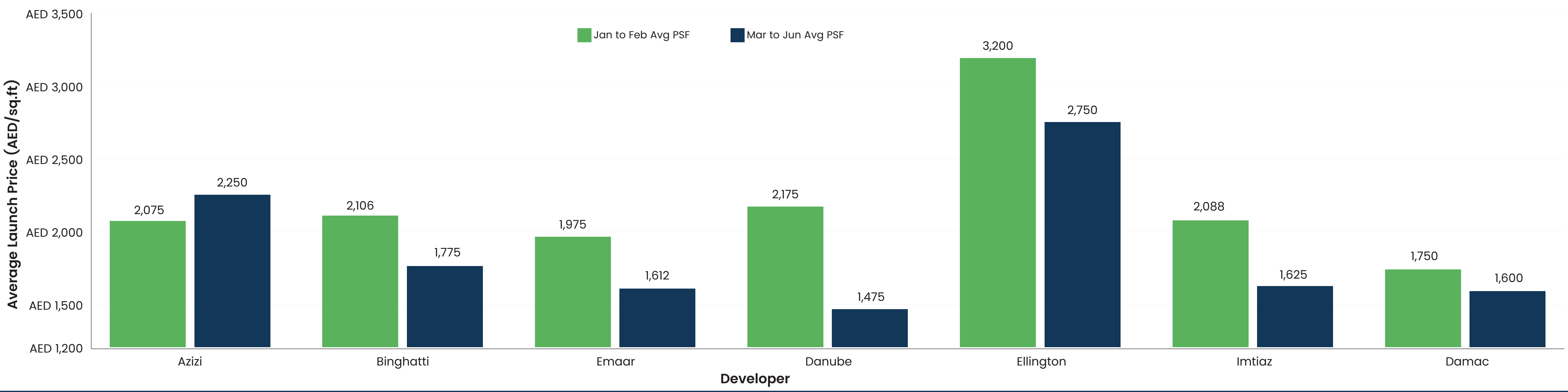
AVERAGE LAUNCH PRICE, WITH VS WITHOUT POST-HANDOVER TERMS

Supports Signal 02 by comparing the average launch price per sq. ft. of the 27 projects offering post handover terms with the 114 projects that did not.



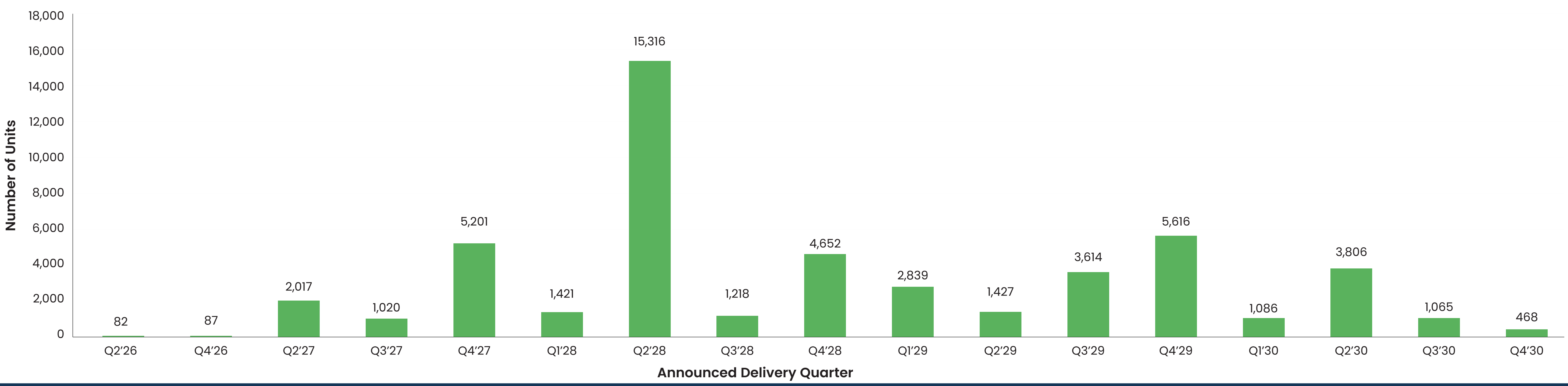
DEVELOPER LAUNCH PRICING, BEFORE VS AFTER FEBRUARY

Supports Signal 03 average launch price per sq. ft. by developer, January to February vs March to June.



UNITS BY ANNOUNCED DELIVERY QUARTER, 2026 THROUGH 2030

Supports Signal 04 total units per announced handover quarter. Q2 2028 is highlighted as the most concentrated single quarter in the pipeline.



07 - PROJECT REFERENCE

Top 15 projects by unit count

The fifteen largest projects by unit count account for 27,315 units, representing 53.6% of the total 50,935 units launched in H1 2026. Mercedes-Benz Places was the largest single project in the cohort and materially influenced the H1 unit distribution.

#	PROJECT	DEVELOPER	LOCATION	UNITS	PSF(AED)	ANNOUNCED HANDOVER	SEGMENT
1	Mercedes-Benz Places	Binghatti	Meydan	12,814	2,875	Q2 '28	UPPER-MID
2	Azizi Milan 18	Azizi	Dubailand	1,528	2,000	Q2 '27	UPPER-MID
3	Tilal Binghatti	Binghatti	Al Rowaiyah First	1,432	1,650	Q4 '29	MID-MARKET
4	Binghatti Skyflame 1	Binghatti	Majan	1,378	1,650	Q4 '27	MID-MARKET
5	Azizi Jaddaf Beach Oasis	Azizi	Al Jaddaf	1,259	2,250	Q4 '28	UPPER-MID
6	Serenz by Danube	Danube	JVC	1,204	2,175	Q4 '29	UPPER-MID
7	The Wow Tower	Mr. Eight Development	Dubailand Residence Complex	1,078	1,725	Q3 '29	MID-MARKET
8	Raw District by Imtiaz	Imtiaz	Downtown Jebel Ali	924	1,625	Q1 '29	MID-MARKET
9	The Meriva Collection	Ellington Properties	Dubai Islands	903	3,200	Q2 '30	LUXURY
10	Binghatti Wraith	Binghatti	Al Jaddaf	855	2,050	Q4 '27	UPPER-MID
11	Terra Woods	Emaar	Dubai Expo City	824	2,125	Q1 '30	UPPER-MID
12	Serenia District East Residences	Palma Development	Jumeirah Islands	809	2,600	Q2 '30	UPPER-MID
13	Greenz by Danube	Danube	Al Rowaiyah First	785	1,475	Q4 '29	MID-MARKET
14	Binghatti Skyflame 2	Binghatti	Majan	782	1,625	Q4 '27	MID-MARKET
15	The Wilds Residences	Aldar Properties	Dubailand	740	1,700	Q2 '30	MID-MARKET

SCOPE, DEFINITIONS AND METHODOLOGY

SCOPE

This report covers residential project launches recorded across Dubai from January to June 2026. Project counts, unit counts, launch pricing, announced handover timelines, payment plans and broker commission terms reflect launch-stage records and should be read alongside subsequent registrations, developer updates and delivery progress. All handover dates reflect announced schedules at time of launch.

PRICING METHODOLOGY

Average launch price is calculated as a simple project-level average across all 141 launches, with one observation per project and no weighting by unit count or saleable area. All launches had sufficient pricing information for classification. Mercedes-Benz Places accounted for 12,814 units, representing 25.2% of H1 launched units. Consequently, a unit-weighted average would differ materially from the simple average. Both the average and median are presented to provide a fuller view of the pricing distribution.

MARKET SEGMENT THRESHOLDS

Projects are classified using launch prices per sq.ft. Affordable covers prices below AED 1,200, Mid-Market covers prices from AED 1,200 to below AED 1,800, Upper-Mid covers prices from AED 1,800 to below AED 3,000, Luxury covers prices from AED 3,000 to below AED 6,000, and Ultra-Luxury covers prices of AED 6,000 and above. Each range includes its lower bound and excludes its upper bound, except Ultra-Luxury, which has no upper limit. Projects with multiple unit types are classified using the project-level launch price. All 141 launches had sufficient pricing information and were included in the analysis.

PAYMENT PLANS AND COMMISSION

A post-handover payment plan is defined as any structure where a portion of the purchase price is payable after the announced handover date. Downpayment level reflects the advertised percentage required at booking. Where a project offers more than one payment structure, the primary structure advertised at launch is used. Broker commission reflects the standard advertised rate at the time of launch. Projects with tiered or variable commission structures are recorded at the base rate.

REIDIN

Data Analytics

www.reidin.com | info@reidin.com